

March 24, 2016

Texas Navigator Q&A

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Texas WorldCat Navigator Q&A Session

Phone #: 1-877-668-4490

Meeting #: 713 435 356

- You will be muted upon entry. If you are unable to dial in for audio you may listen on your computer speakers. To join, click the “Audio” menu in the upper left Webex window, and then click “Audio Conference”. A popup will open; click on “Use computer for audio”.
- If you are joining the audio conference through speakers, please use the chat option to ask questions.

Agenda

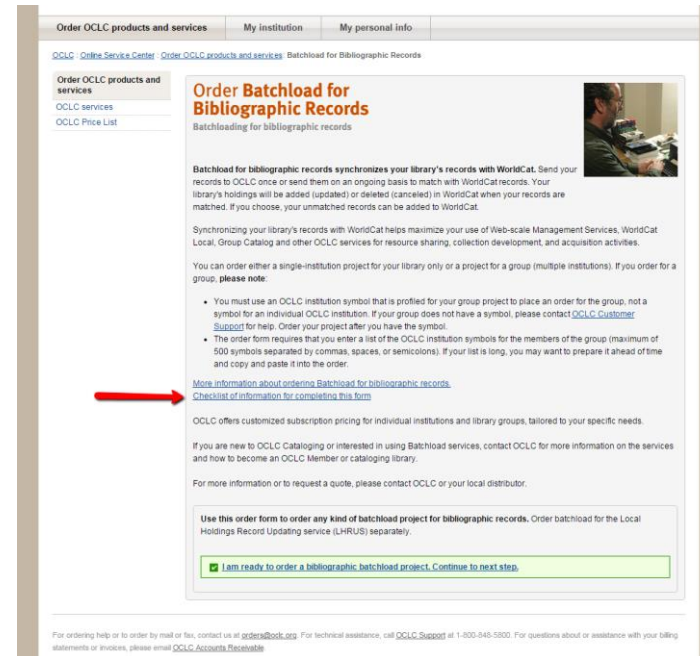
1. The Batchload Order Form (only available through March 31!)
2. Requesting an Online Service Center Account
3. The Batchload Order Checklist
4. Product Services Web Account
5. Submitting the Batchload Order
6. Submitting the Data and Label files
7. Q&A with Ralph Horton

Before you Begin

- Know your OCLC symbol
 - <http://www.oclc.org/contacts/libraries.en.html>
 - Uncheck “Show only OCLC Members”
 - You can also select “more search options” to search by your city.
- Request an Online Service Center Account
 - <http://www.oclc.org>
 - Click “Sign in to Services” on the top right.
 - Under “Other Services” in the middle left, select “Online Service Center.”
 - On the left side, select “Create an account.”
 - Enter your OCLC symbol, and then click continue. Complete the info on the following page. Click “Create Account” (orange button in bottom left)
 - Once you’ve completed this form, it can take 24 hours before your account is activated. You will receive a confirmation email.

Starting the Batchload Order

- Wait for confirmation email that your Online Service Center account is active.
- [Navigate to the OSC](#) as before and login with your credentials.
- Select “Order OCLC products and services.”
- Select “Batchload for Bibliographic Records” either by clicking on the title or by clicking “Order.”
- Click on “Checklist of information for completing this form” to download a pdf version of the form.
- Print out the form and fill it out BEFORE doing the online form
- Write your username and password for the OSC on the checklist.



The screenshot shows the OCLC Batchload for Bibliographic Records order form. The page has a header with navigation links: "Order OCLC products and services", "My institution", and "My personal info". Below the header, there is a sidebar with links: "OCLC - Online Service Center", "Order OCLC products and services", and "Batchload for Bibliographic Records". The main content area is titled "Order Batchload for Bibliographic Records" and includes a sub-header "Batchloading for bibliographic records". The text explains that batchload synchronizes library records with WorldCat and provides instructions on how to use the service. A red arrow points to the link "Checklist of information for completing this form". At the bottom, there is a green button that says "I am ready to order a bibliographic batchload project. Continue to next step."

Order OCLC products and services | My institution | My personal info

[OCLC - Online Service Center](#) | [Order OCLC products and services](#) | Batchload for Bibliographic Records

Order OCLC products and services
OCLC services
OCLC Price List

Order Batchload for Bibliographic Records

Batchloading for bibliographic records

Batchload for bibliographic records synchronizes your library's records with WorldCat. Send your records to OCLC once or send them on an ongoing basis to match with WorldCat records. Your library's holdings will be added (updated) or deleted (canceled) in WorldCat when your records are matched. If you choose, your unmatched records can be added to WorldCat.

Synchronizing your library's records with WorldCat helps maximize your use of Web-scale Management Services, WorldCat Local, Group Catalog and other OCLC services for resource sharing, collection development, and acquisition activities.

You can order either a single-institution project for your library only or a project for a group (multiple institutions). If you order for a group, please note:

- You must use an OCLC institution symbol that is profiled for your group project to place an order for the group, not a symbol for an individual OCLC institution. If your group does not have a symbol, please contact [OCLC Customer Support](#) for help. Order your project after you have the symbol.
- The order form requires that you enter a list of the OCLC institution symbols for the members of the group (maximum of 500 symbols separated by commas, spaces, or semicolons). If your list is long, you may want to prepare it ahead of time and copy and paste it into the order.

[More information about ordering Batchload for bibliographic records](#)
[Checklist of information for completing this form](#)

OCLC offers customized subscription pricing for individual institutions and library groups, tailored to your specific needs.

If you are new to OCLC Cataloging or interested in using Batchload services, contact OCLC for more information on the services and how to become an OCLC Member or cataloging library.

For more information or to request a quote, please contact OCLC or your local distributor.

Use this order form to order any kind of batchload project for bibliographic records. Order batchload for the Local Holdings Record Updating service (LHRUS) separately.

☒ I am ready to order a bibliographic batchload project. Continue to next step.

For ordering help or to order by mail or fax, contact us at orders@oclc.org. For technical assistance, call [OCLC Support](tel:1-800-545-5800) at 1-800-545-5800. For questions about or assistance with your billing statements or invoices, please email [OCLC.Accounts.Receivable](mailto:OCLC.Accounts.Receivable@oclc.org).

Order Checklist Page 2

- Your project is for a **Single Institution**.
- The OCLC product supported by your project is: **An OCLC Group Catalog**
 - The Group Catalog's name is: **Texas Group Catalog**

Order Checklist Page 3

- The Format of the data you are submitting is: **MARC (MARC 21)**
- The Character encoding is: **MARC-8**
 - Select these values unless your ILS vendor or systems staff have told you otherwise.
- The Location and Format of your unique system bib number:
 - Most commonly in the 001 field, but if it is not, select where it is in **your system**.
 - If you do not know, ask your systems staff or your ILS vendor.
 - It may also be referred to as: Title Control Key, Bibload Report Number, Import Source, or Bib Number
 - Be sure to provide an example of what one of your unique system numbers looks like.

Order Checklist Page 3 & 4 – OCLC #s

- The Location of the OCLC Control Number in your records:
 - You may NOT have this. If you do not, select “None.”
 - If you have some holdings set in WorldCat, you probably have these somewhere. OCLC numbers are 8-10 digits and may or may not have a prefix such as ocn, ocm or (OCoLC) in your system. More info about OCLC Control numbers is [available here](#).
- Do you want to qualify the OCLC number for record matching?
 - Only necessary if you **have** OCLC control numbers in your ILS.
 - If you do have OCLC control numbers, select “**Derived Title.**”

Order Checklist Page 4 – Project Type

- If this is your initial batchload project, select: **One Time.**
 - The type of project will be:
 - **Reclamation:** if you have some holdings in WorldCat and need to sync up data.
 - **Retrospective:** If you have no holdings in WorldCat or large holdings gaps. This type will not cancel any holdings.
- Select: **Set for All**
- If you are setting up an ongoing project after you've initially set holdings, you would select **"Ongoing"**

Order Checklist Page 4 – Project Type ONGOING

- If you are ordering your ongoing project, you can either:
 - Order one project (Set or cancel based on value of Rec Stat) if you can send information about both your deselected items and your additions in MARC format.
 - Order two projects (one for Cancels, one for Sets) – good if you cannot send MARC records for deselected items. You can send a list of OCLC numbers for the cancels project.
 - ** If you need to order 2 projects (one cancels, one sets), please complete 2 order forms.

Order Checklist Page 5

- You will be able to skip the first box.
- Should we add your records when they do not match existing WorldCat records?
 - OCLC recommends you select **No** for this question.

Order Checklist Page 6

- The Type of Output to Receive is: **Report and your records**
- The OCLC Control Number merge location: **035 \$a is recommended**
 - If you select the 001 field or a field in which your local system bib numbers are located, the records OCLC sends back will overwrite those numbers. You do not want to do that!
- The Format to select is: **(OCoLC)1234** unless your systems staff tell you they would prefer otherwise.

Order Checklist Page 7

- How many records do you estimate will be in the project you submit?
 - If you extract your records first, you will come close to knowing the exact number.
 - If not, you should be able to run a report in your ILS or ask cataloging staff for a total number of records.
- How will you submit your records? **Upload to Product Services Web** is most common for TX libraries
- Do you need a PSWeb-only authorization and password?
 - Most TX Libraries included in the Navigator contract already have this set up. If no one at your library knows what this is (it is a 9 digit number beginning with 100), contact WorldCatNavigatorIM@oclc.org for assistance.

Submitting your Batchload Order Form

- Using your answers written on your checklist, you can now fill out the form online.
- Log in to the Online Service Center as before
(<https://www.oclc.org/webapp/wcs/stores/servlet/OSCPortal?storeId=10051>)
- Select “Order OCLC products and services.”
- Select “Batchload for Bibliographic Records” either by clicking on the title or by clicking “Order.”
- Click on **“I am ready to order bibliographic batchload project. Continue to next step.”**

For more information or to request a quote, please contact OCLC or your local distributor.

Use this order form to order any kind of batchload project for bibliographic records. Order batchload for the Local Holdings Record Updating service (LHRUS) separately.

☒ [I am ready to order a bibliographic batchload project. Continue to next step.](#)

Submitting the Batchload Order Form

- Your institution information should already be filled in.
- Select the batchload contact from the drop down menu or enter a new contact name below.
- Click “Continue.”
- The contact’s info will already be filled in.
- Start completing the form using the info from your completed checklist.
- When finished, review your answers, and then click “Continue” at the bottom.
- Review and agree to the Terms and Conditions by clicking “I agree.”
- Click “Submit.”
- You will receive an email confirmation with a project ID and info about what is next.

I've submitted my batchload order form... now what?

- Wait until you receive a confirmation email from Batch Services with your assigned project ID (it will begin with P and be followed by a series of digits).
- Create your files and send them to OCLC (some instructions will be included in email)
- You will be notified by email when your data is received.
- Your files will enter the queue for data processing (up to 60 days)
- You will receive an email when your data has been loaded.

Naming the DATA File(s) – Initial Batchload

- Take the file(s) you extracted from your ILS containing your MARC records and copy them into a new text file(s).
 - Use a program like Notepad. DO NOT USE WORD.
 - Each file should contain no more than 40,000 records. If you have more records than that, divide them into multiple files.
- Name the DATA file(s).
 - Type DATA.D followed by the current date in the format yymmdd (Example: DATA.D160324)
 - If you are submitting multiple DATA files, add the extension .FILE followed by a unique number for each file. (Example: DATA.D160324.FILE1, DATA.D160324.FILE2, etc.)
 - For the last file you send for your project, replace the .FILE extension with the .LAST extension. This signals that you have sent all of your records. (Example: DATA.D160324.LAST).
 - If you are only sending ONE file, also use only the .LAST extension (Example: DATA.D160324.LAST)

Creating the LABEL File(s) – General Tips

- Open a new document in a text editor like NotePad (DO NOT USE WORD.)
- Type each of the five field labels on separate lines, each followed by two blank spaces and then the data.
- Type in all capital letters.
- Do not add any other data or notes.
- You MUST enter two spaces between each label and the data.
- It is helpful to use a fixed-length font, like Courier New, so that you can easily see and fix any spacing errors.
 - To change font in NotePad, click **Format > Font**. In the font list, select **Courier-New**.
- Press <Enter> to enter the next field at the end of each line.

Creating the LABEL file(s) – 5 data field lines

- **DAT** Date the DATA file was compiled, in format yyyymmdd, followed by 000000.0, no spaces.
 - Example: DAT 20160324000000.0
- **RBF** Number of records in the DATA file, no comma
 - Example: RBF 14663
- **DSN** DATA file name
 - Example: DSN DATA.D160324.LAST
- **ORS** Your OCLC Institution Symbol
 - Example: ORS IKM
- **FDI** Batch Services-assigned Project ID (the “P” number you received in your order confirmation email).
 - Example: FDI P012345
 - Caution: DO NOT USE the WEB-xxxxxx number sent by the Online Services Center that confirms your order was transmitted.

Putting it All Together

- An Example of LABEL file content

DAT 20160324000000.0

RBF 14663

DSN DATA.D160324.LAST

ORS IKM

FDI P012345

Saving and Naming the LABEL File

- Click **FILE > Save As** to name and save the file.
- In the **File Name** box of the “**Save As**” window, type **LABEL.D** and then the current date in the format yymmdd. Example: LABEL.D160324
- Add the .FILE extension if you create multiple LABEL files, followed by the same number as the DATA file it describes. Example: LABEL.D160324.FILE1
- If you ordered a one-time project, and this is the LABEL file that corresponds to either the last DATA file **OR** if this is the **ONLY** file you are sending, replace the .FILE with .LAST. Example: LABEL.D160324.LAST
- In the **Encoding** list, select **ANSI** if not already selected.
- In the “Save As” type, select “All Files.”

Submitting the Files via PSWeb – Part 1

- In your web browser, go to <http://psw.oclc.org>.
- In the list of links on the left, click **File uploads**.
- On the File Uploads page, click **OCLC Batch Services (Batchload orders with project number Pnnnnnnn)**.
- Enter your OCLC logon authorization and password
 - Use one that is associated with the same OCLC institution symbol you used to order your batchload project) and click **Enter**.
 - **Or** use the PSWeb-only authorization you received from orders@oclc.org, if you requested one in your batchload order.

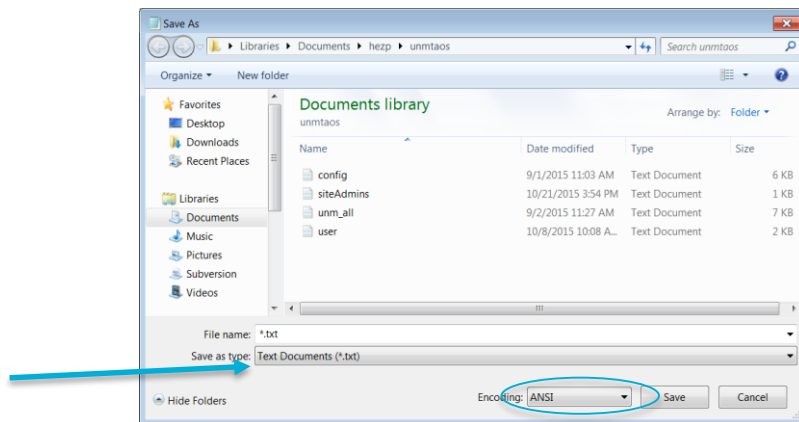
Submitting the Files via PSWeb – Part 2

- Send the DATA file first. Under Data Files(s), click Browse to locate the file on your computer.
- Send the LABEL file next. Make sure it is the one that corresponds to the first DATA file (if submitting more than one DATA file)
- Enter more pairs of DATA and LABEL files as needed.
- Click **Upload Files**. Your files should appear in the Current Files list below the **Upload Files** button.
- Click **Log Out** below the list of links on the left.
- Files successfully sent to OCLC are picked up automatically at approximately 2 AM Eastern each day. Shortly after that, you will receive an email notification that OCLC received your file. If you do NOT receive this email, contact OCLC batch services at batchload@oclc.org or call 1-800-548-5800.

Other Tips

- Do not have the file name end in .txt. Make sure in the “Save As” box, you select “All Files” in the Save As File Type drop down near the bottom of the box.
- Do not delete any holdings from your collection while files are processing.

Change file type to “All Files” with this drop down.



After your Files have been processed....

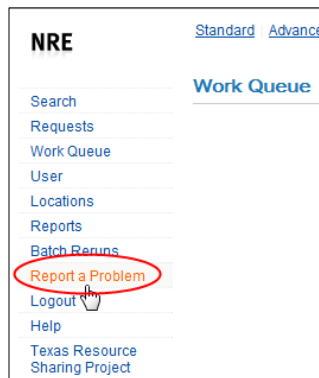
- Go to PSWeb to pick up your files. (Under Reports, Files of Records)
- Successfully processed data will have no file extension.
- .UNRES files are unresolved records. This means you sent in records that may have been too brief or reflect original items for which no match was found in WorldCat.
- .DUP files are Duplicate records – they contain the same local bib numbers. The first record encountered will be processed and subsequent ones ignored.
- Cross-ref report – Use this as a quality check after reloading records into your ILS.

Time for your Questions



Need help after the session?

1. If you are already live, click the “Report a Problem” link in the NRE staff interface



2. If you are still implementing or have not yet started, send an email message to WorldCatNavigatorIM@oclc.org
3. You can also consult this document:
<http://www.oclc.org/content/dam/support/batchload/documentation/using/PSWebinstructions.pdf>
4. Call OCLC Support at 1-800-848-5800